

ADVISORY
BOARD
for the ARTS

Transforming Arts Organizations Worldwide

Audience Quantitative Initiative: A Closer Look

December 2020

Objectives of this Session



- ✓ Review findings of the *New Loyals* quantitative initiative
- ✓ Go into more detail behind the analysis
- ✓ Answer your questions

This session is more informal, and we have extra time for Q&A throughout. Please speak up at any time or use the chat to ask questions.

Participants on Today's Session

ALLEY THEATRE

Rachel Applegate
Lauren Pelletier
Mara Koss

AMERICAN SHAKESPEARE CENTER

Ethan McSweeney
Jo Manley

ARENA STAGE

Renee Littleton

ASPEN MUSIC FESTIVAL AND SCHOOL

Alan Fletcher
Laura Smith

AUSTIN OPERA

Annie Burrige
Melysa Rogen

BOSTON GAY MEN'S CHORUS

Sarah Shoffner
Craig Coogan

BREVARD MUSIC CENTER

Jason Posnock

CARNEGIE HALL

Abby Hull

DALLAS SYMPHONY ORCHESTRA

Kim Notelmy

FORD'S THEATRE FOUNDATION

Liza Lorenz

HOUSTON GRAND OPERA

Scott Ipsen

JACKSONVILLE SYMPHONY

Peter Gladstone

JOFFREY BALLET

Colene Byrd

KANSAS CITY SYMPHONY

Danny Beckley

LA JOLLA PLAYHOUSE

Debby Buchholz

LYRIC OPERA OF KANSAS CITY

Deborah Sandler

OPERA OMAHA

Kurt Howard
Rebecca Brown
Shannon Walenta

PENNSYLVANIA BALLET

Shelly Power

PHILADELPHIA THEATRE COMPANY

Paige Price
Emily Zeck

ROCO HOUSTON

Amy Gibbs
Greta Rimpo

SAN DIEGO OPERA

Walter Rise

SAN FRANCISCO OPERA

Kathryn Appleton
Chi-Hsuan Yang

THE OLD GLOBE

Tim Shields

THE TIANJIN JUILLIARD SCHOOL

Bo Yan

VICTORY GARDENS

Amanda Cantlin

WELSH NATIONAL OPERA

Andrew Taylor
Martina Fraser
Owain Elidir

YOUNG CONCERT ARTISTS

Daniel Kellogg

Please introduce yourself in the chat and feel free to mention anything you're hoping to learn from the data

Agenda for our Time

01

Background of
the Initiative:
Purpose and
Methods

02

Motivations
and Segments:
How Audiences
Cluster by
Motivation

03

Loyalty
Regressions
and Shared
Values

04

Other
Findings:
Obstacles,
Musical
Background,
Interests and
More

05

Up Next

The Issues Behind the Initiative

Strong return depends on boosting the the loyalty of 'casual' ticket purchasers who are not yet loyal.

Audience Loyalty



The current offer resonates more with our core loyal audience

Current Loyals

- ✓ Value our “pandemic” offerings
- ✓ Attached to our genre at an emotional level
- ✓ Feel a connection to us as purveyor of the genre



Not-Yet-Loyal Audiences

- ✓ Barely consume “pandemic” offerings
- ✓ Are less emotionally engaged to the genre itself
- ✓ Not especially attached to our organization separate from our programming

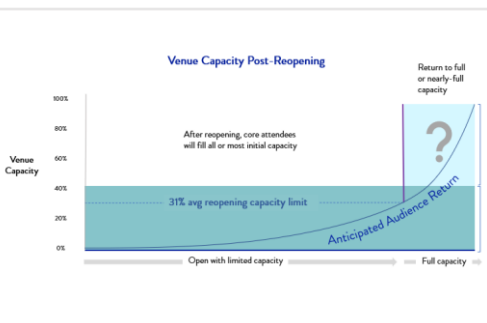


How do motivations vary between loyal and less-loyal audiences?

Motivations to Attend



- | | | | | |
|---|--|---|--|-----------------------------------|
| 1. See art performed at the highest level | 5. Share a passion with likeminded friends | 10. Relive fond memories | 16. Learn to distinguish competence from mastery | 21. Experience a spectacle |
| 2. Challenge myself intellectually, emotionally (and, perhaps, morally) | 6. Keep the arts healthy in my region | 11. Be part of a defining cultural moment | 17. “Give back” to city/region | 22. See someone/ something famous |
| 3. Have a transformative/ meaningful experience | 7. Act as a role model for others | 12. Continue/pass on a tradition | 18. Boost my social standing | 23. Dress up/feel lavish |
| 4. Experience something new/ cutting edge | 8. Feel good about my role in the community | 13. Teach children cultural literacy | 19. Be in the company of other “town elders” | 24. Show friends I’m unique |
| | 9. Support culture important to my city/region | 14. Enrich myself in a new field | 20. Identify as cultured | 25. Get/stay out of a rut |
| | | 15. Earn entry to society/class | | 26. Get to know the “real” city |

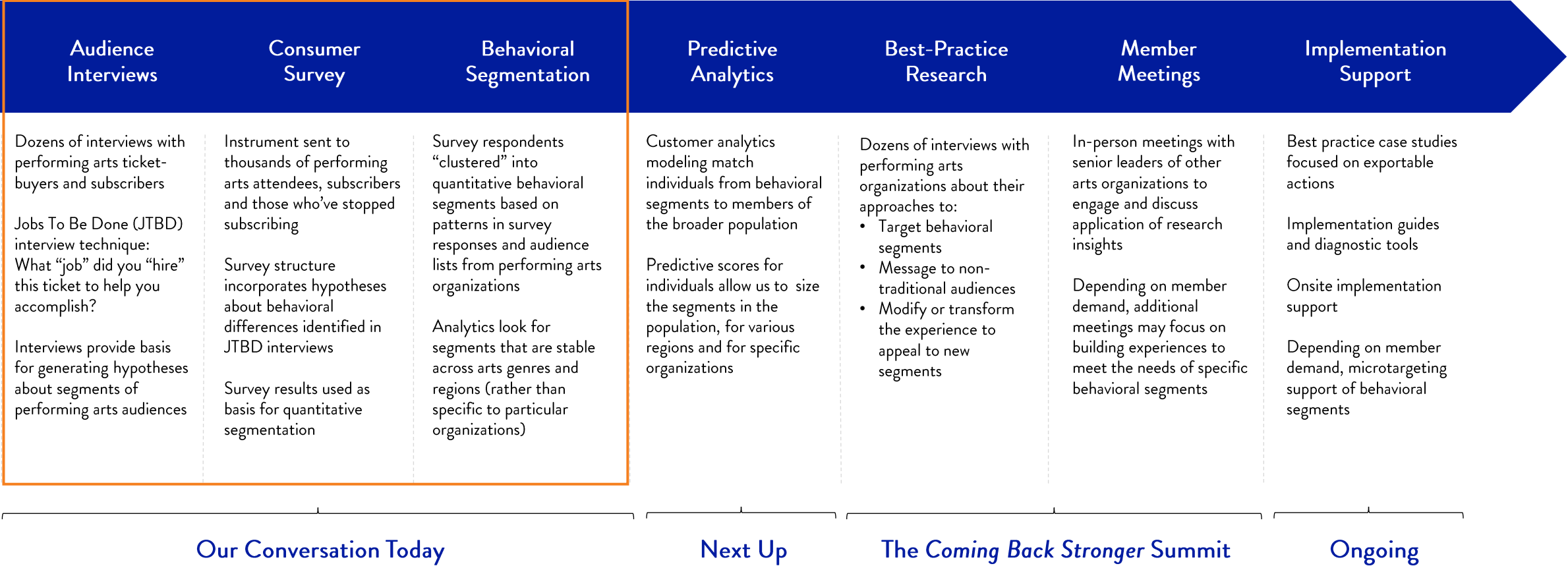


Six Key Takeaways from the Summit

1. Our ability to recover quickly and sustainably from the pandemic depends on our ability to bring back not-yet-loyal audiences to our venues when it's safe.
2. There's a clear lesson from consumer brands about how to increase the loyalty of casual buyers—emotional differentiation.
3. **The most intense form of emotional differentiation, and therefore the most successful at building loyalty, is connection around shared values that both we and our audiences both believe to be part of “who we are.”**
4. Anything we can do right now to connect emotionally and communicate the impact of our community engagement efforts to audiences represents an advance over our current programming-dominant approach.
5. That said, the biggest benefits come when our work transcends marketing, and we become known in the market as a champion for a higher-order shared value whom audiences can rely on to help them make progress in their lives.
6. Now is an especially opportune time to begin, not only because of the urgency of our need, but also the void left by lack of in-person programming, and the range of emotional needs that exist for audiences in quarantine.

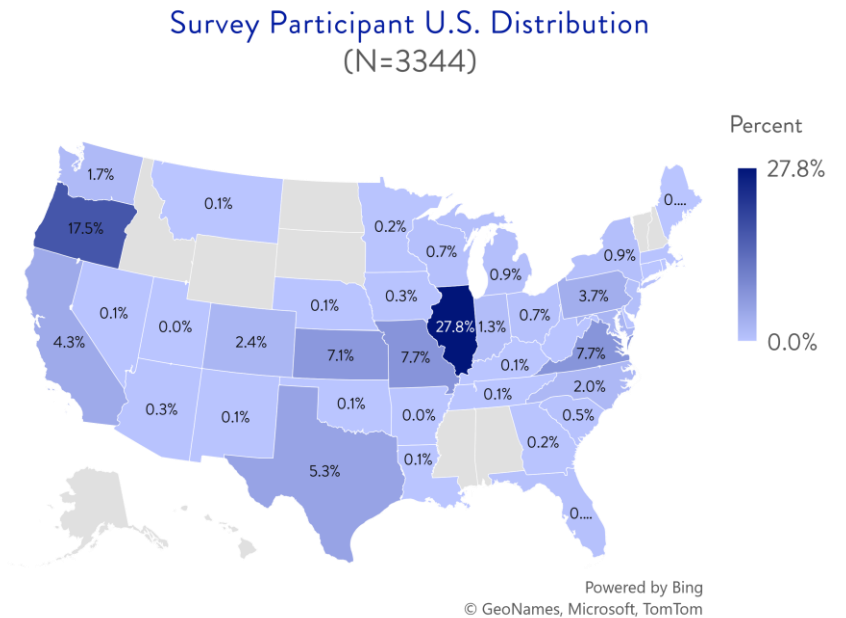
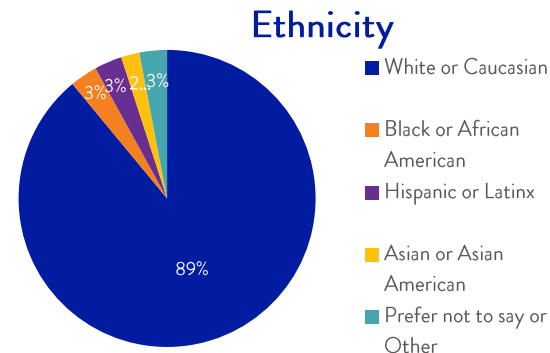
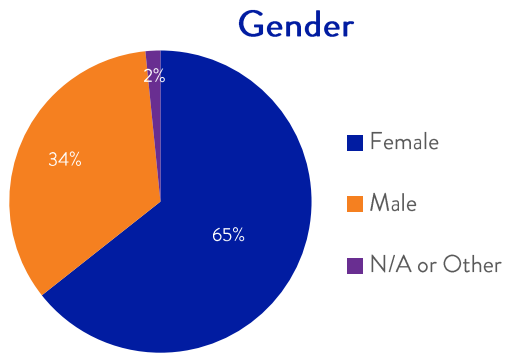
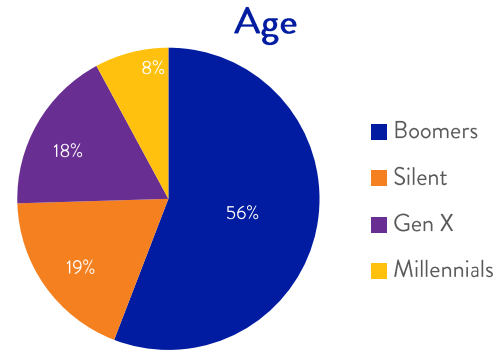
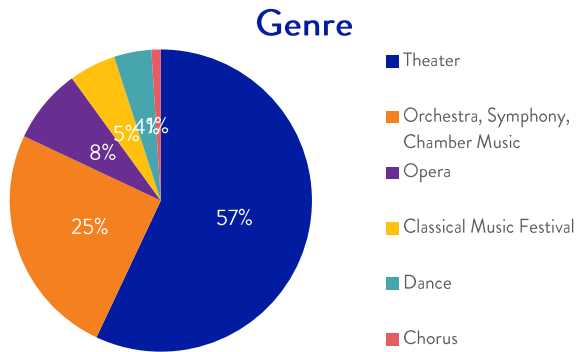
Research Journey

Overview of ABA Audience Research



Survey Participants

Survey participants N=4,752 from nine arts organizations



Theater A (N=1652); Theater B (N=984); Music Festival A (N=212); Music Festival B (N=121); Opera A (N=243); Ballet A (N=214); Presenter A (N=425); Presenter B (N=155); Symphony A (N=706); General Link (N=40)
Baby Boomers = 55-73 years old, Silent Generation = 74-91 years old, Gen X – 39-54 years old, Millennials = 23-38 years old

Survey Questions

Performance questions

- Q1: Which of the following types of performances did you attend in the past year (choose all that apply)?
- Q2: Please write the name and venue of the performance you attended
- Q3: Including this one, how many [Performing Arts Event] performances have you been to in the past year?
- Q4: How did you become aware of the performance? (Mailing, subscription, social media etc.)
- Q5: Prior to attending the performance, which did you find most appealing? (date, content, venue, etc.)
- Q6: **To what extent did the following elements motivate your decision to attend this particular performance?**
- Q7: Please place your top motivations to attend in rank order, starting with the most important.
- Q8: **To what extent did this performance deliver or fail to deliver on your top motivation, versus your expectations?**
- Q9: How would you rate the following elements of the performance or experience?
- Q9.1: The venue and amenities
 - Q9.2: The set/staging
 - Q9.3: The value you received for money spent
 - Q9.4: The quality of the performers
 - Q9.5: Service quality offered by staff
 - Q9.6: Your seats
 - Q9.7: The composition or play
- Q10: How likely or unlikely are you to purchase tickets to another performance...
- Q10.1: ...by these performers?
 - Q10.2: ...by this composer/writer/choreographer?
 - Q10.3: ...of this genre?
 - Q10.4: ...at this venue?
- Q11: How likely or unlikely are you to recommend a similar performance to friends or colleagues?

General preferences and background in the arts

- Q12: How much do you agree or disagree with the following statements?
- Q12.1: I like performances that push boundaries
 - Q12.2: I enjoy experiences where I can learn about or see how the art gets made (rehearsals, lectures, etc.)
 - Q12.3: I prefer performances of familiar works (featuring known composers or choreography)
- Q13: How true or false are the following statements about your arts exposure?
- Q13.1: I am new to arts experiences
 - Q13.2: I frequently attended arts performances as a child
 - Q13.3: I am very knowledgeable about the arts
 - Q13.4: I performed or took lessons in theater, orchestra, singing or ballet as a child
- Q14: How well can you read music?

Ticket purchase, experience of purchasing

- Q15: Did you purchase and pay for tickets for the performance?
- Q16: Did you pay for others (spouse, family, friends, etc.) to attend?
- Q17: How confident did you feel about the purchase?
- Q18: On average, how much did each ticket cost including fees?
- Q19: What did you think about the ticket price?
- Q20: What level or tier of seats did you purchase?
- Q21: How far in advance did you decide to go to this performance?
- Q22: How many people did you go with?

Questions about your companions

- Q23: With whom did you attend?
- Q24: Have you gone to another, different performance with any of the same people in the past year?
- Q25: Setting aside who actually went with you, who would have been the 'ideal' companion(s) for this performance?

Additional preferences and related activities

- Q26: If you hadn't gone to this performance, what would you have done during this time?
- Q27: Did you participate in the following social activities (before or after you attended the performance)?
- Q28: To what extent did each of the following educational activities improve or detract from your enjoyment of the event (before, during or after the performance)?
- Q28.1: Educating myself about the performance through reading/the internet
 - Q28.2: Attending a rehearsal or related performance
 - Q28.3: Talking to my friends/companions about the performance to learn more
 - Q28.4: Listening to or watching a recording of the performance/composition
- Q29: **To what extent, if at all, did any of the following obstacles reduce your enjoyment of the event?**
- Q29.1: Inconvenient Travel
 - Q29.2: Performance Problems (e.g., changes to performers, performance quality, seats)
 - Q29.3: Finding Companions
 - Q29.4: Limited Time
 - Q29.5: High Cost (e.g., tickets, parking etc.)
 - Q29.6: Venue Challenges
- Q30: Were any of the following true about this performance? (assortment of specifics like long travel)
- Q31: Have you attended non-performance events with the organization that sponsored your performance, in the past year?
- Q32: **Indicate how strongly you disagree or agree with the statement below: I felt welcome at the performance**
- Q33: What one piece of anonymous advice would you give to the organization that sponsored your performance (the symphony, venue, opera, ballet or theater troupe)?

Related activities and personal values

- Q34: How important or unimportant is it to you that you do the following activities regularly?
- Q34.1: Participating in political events
 - Q34.2: Donating money to charitable causes
 - Q34.3: Attending religious services
 - Q34.4: Going to museums
 - Q34.5: Volunteering in my community
 - Q34.6: Sitting on a charitable or corporate board
 - Q34.7: Attending fundraisers such as galas
 - Q34.8: Participating in book club(s) or discussion groups
- Q35: **Please select up to 10 of the following values/behaviors that most reflect who you are, not who you desire to become.**

Subscriptions and donations to arts nonprofits

- Q36: Have you subscribed to an arts organization ticket series in the past ten years?
- Q37: What type of subscription have you have (check all that apply)?
- Q38: Are you a current subscriber (to any of these subscriptions)?
- Q39: Have you donated money to a symphony, opera, theater, ballet/dance, chorus or music festival in the past year?
- Q40: To what types of organizations have you donated?
- Q41: Roughly how much have you donated to the arts in the past year?

Demographic questions

- Q42: What is your ethnicity?
- Q43: What is your gender?
- Q44: What is your birth year?
- Q45: What is the highest level of formal education you have completed?

Overall and Genre Reports Available Now

Audience Survey Reports Including Genre-Specific Reports

Overall Report With All Data



Overall ABA Audience Survey Distribution Data
Fielded February-April 2020, N=4600
December 2020

Overall Survey Distribution Data

Reports By Genre



Classical Music Festival Patrons ABA Audience Survey Data
Fielded February-April 2020, N=229
GENRE REPORT

Classical Music Festival Survey Data



Dance Patrons ABA Audience Survey Data
Fielded February-April 2020, N=488
GENRE REPORT

Dance Survey Data



Orchestra, Symphony, or Chamber Music Patrons ABA Audience Survey Data
Fielded February-April 2020, N=1199
GENRE REPORT

Orchestra Survey Data



Opera Patrons ABA Audience Survey Data
Fielded February-April 2020, N=367
GENRE REPORT

Opera Survey Data



Theater Patrons ABA Audience Survey Data
Fielded February-April 2020, N=2640
GENRE REPORT

Theater Survey Data

<https://www.advisoryboardarts.com/audiencesummitcontent>
(Requires Login – click “forgot password” to get a new one)

Agenda for our Time

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Motivations Vary In Closeness to the Performance Itself

Motivations Included in the Survey

Deeply Connected to Performance on Stage

1. See performance executed at the highest quality level
2. Challenge my preconceptions/ confront uncomfortable truths through art
3. Connect with something I am passionate about
4. See work on the frontier of my favorite arts genre
5. Add to my expertise in an arts form
6. Become educated about the arts/this art form

Related to the Arts, but Not So Much This Performance

7. Have a transformative experience
8. Participate in thought-provoking conversations with others
9. Keep my community culturally vibrant
10. Support a cause in tandem with other community leaders
11. Celebrate my cultural heritage

Related to the Arts, but Not So Much This Performance

12. Connect with family and friends in an enriching environment
13. Take part in a meaningful shared experience with a crowd
14. Create a shared memory or continue a tradition
15. Introduce or teach others about an art form I enjoy
16. Connect with an art form I cherished when I was younger

Only Tangentially Related to the Arts

17. Treat myself to a special occasion or luxury
18. Move to the next level of adulthood/societal engagement
19. Be in the company of other "town elders"
20. Be a part of something culturally significant
21. Fulfill a sense of duty toward the arts
22. Get to know a place better/connect with a place
23. See what everyone is talking about
24. Experience something popular or someone famous
25. Have an entertaining escape from the day-to-day
26. Experience something new and different
27. Be a supportive friend, colleague, or family member
28. Get out of rut/force myself to take time away

For 33% Of Audiences, Functional = Emotional

Motivational Segments from ABA Audience Research

For 2/3 of your audiences, the art form requires translation to what they value most.

For 1/3 of your audiences, the functional attributes of the performance are easily translated into what they value because what they care most about is what's on stage. The art form is part of their identity.

66%: Looking for Something Else

11% Civic Stewards
Fulfill duty to the arts, create community

12% Social Samplers
Try something new

9% Willing Companions
Support friends/family

14% Conversational Challengers
Converse, challenge preconceptions

9% Culture Surfers
See popular/famous works

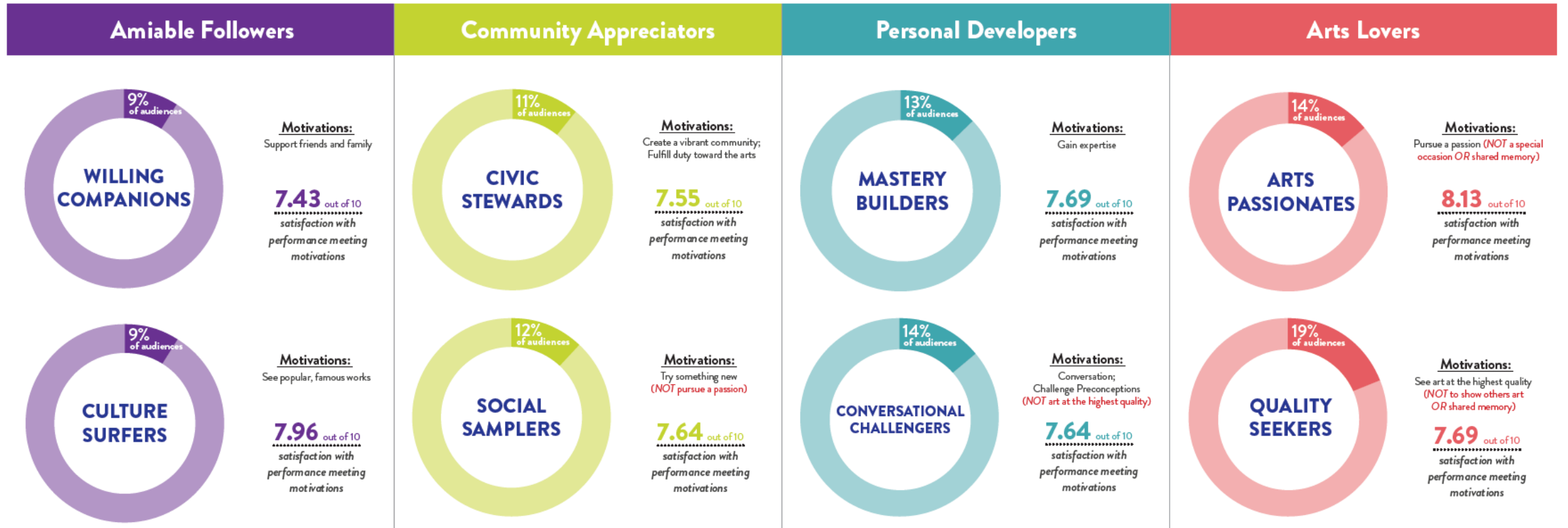
13% Mastery Builders
Gain expertise

33%: Arts Lovers

14%: Arts Passionates

19%: Quality Seekers

The Eight Motivational Segments in the Arts



Which motivational segment do you think you typically fall into?

Segment Introductions: Arts Lovers



Motivations:
See art at the highest quality
(*NOT to show others art*
OR shared memory)

7.69 out of 10
satisfaction with
performance meeting
motivations

Attendance	Values
2.52 average number of performances attended in the past year	Excellence; Balance
Demographics*	Loyalty Characteristics
Average age: 64 Ethnicity: 83% white Gender: 47% male	Frequent Attenders Subscribers



Motivations:
Pursue a passion (*NOT a special occasion OR shared memory*)

8.13 out of 10
satisfaction with
performance meeting
motivations

Attendance	Values
2.58 average number of performances attended in the past year	Compassion; Enthusiasm; Creativity
Demographics*	Loyalty Characteristics
Average age: 64 Ethnicity: 89% white Gender: 43% male	Frequent Attenders Donors

Arts Lovers are the Core of Your Audience

- They are both frequent attenders of their chosen genre.*
- Arts Passionates are statistically more likely to be donors
- Quality Seekers are statistically more likely to be subscribers

*Number of performances asked as a range; average was calculated as midpoint of each category with the maximum at 12 per year.

Segment Introductions: Personal Developers



Motivations:
 Conversation;
 Challenge Preconceptions
 (NOT art at the highest quality)

7.64 out of 10
 satisfaction with
 performance meeting
 motivations



Motivations:
 Gain expertise

7.69 out of 10
 satisfaction with
 performance meeting
 motivations

Attendance		Values	
2.02	average number of performances attended in the past year	Compassion; Friendship; Competence; Ethics	
Demographics*		Loyalty Characteristics	
Average age: 58 Ethnicity: 84% white Gender: 27% male			

Attendance		Values	
2.34	average number of performances attended in the past year	Personal growth	
Demographics*		Loyalty Characteristics	
Average age: 64 Ethnicity: 92% white Gender: 40% male		Frequent attenders	

Personal Developers May Be The Greatest Opportunity For Most

- Mastery builders are frequent attenders
- Conversational challengers are slightly younger on average
- Values of conversational challengers and mastery builders are very close to those of many arts organizations

Segment Introductions: Community Appreciators



Motivations:
Try something new
(**NOT** pursue a passion)

7.64 out of 10
satisfaction with
performance meeting
motivations



Motivations:
Create a vibrant community;
Fulfill duty toward the arts

7.55 out of 10
satisfaction with
performance meeting
motivations

Attendance		Values	
1.94	average number of performances attended in the past year	Independence; Patience; Learning	
Demographics*		Loyalty Characteristics	
Average age: 59 Ethnicity: 86% white Gender: 35% male			

Attendance		Values	
2.42	average number of performances attended in the past year	Being liked; Making a difference; Involvement in Community; Family	
Demographics*		Loyalty Characteristics	
Average age: 64 Ethnicity: 90% white Gender: 40% male		Frequent Attenders Donors Subscribers	

Community Appreciators Are A Split Category

- Social samplers are low priority: rarely attend, little loyalty
- Civic stewards may be the greatest loyalty opportunity: frequent attenders, donors, subscribers – but motivation often unmet.

Segment Introductions: Amiable Followers



Motivations:
See popular, famous works

7.96 out of 10
satisfaction with
performance meeting
motivations

Attendance	Values
2.34 average number of performances attended in the past year	Humor; Enthusiasm
Demographics*	Loyalty Characteristics
Average age: 60 Ethnicity: 83% white Gender: 45% male	Frequent attenders



Motivations:
Support friends and family

7.43 out of 10
satisfaction with
performance meeting
motivations

Attendance	Values
2.38 average number of performances attended in the past year	Excellence
Demographics*	Loyalty Characteristics
Average age: 60 Ethnicity: 79% white Gender: 43% male	Frequent attenders Weakly donors

Amiable Followers Are a Challenge

- Culture Surfers looking for what is popular or famous, not much opportunity beyond that.
- Willing Companions are inscrutable – unexpectedly frequent attenders and donors (may be partners of Arts Passionates or Quality Seekers)

Segment Variation Across Genre

Arts Lovers*

Looking for Something Else*

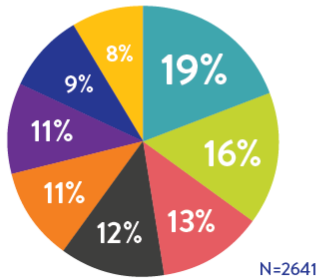
Quality Seekers
Arts Passionates

Conversational Challengers
Mastery Builders

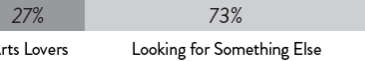
Social Samplers
Civic Stewards

Willing Companions
Culture Surfers

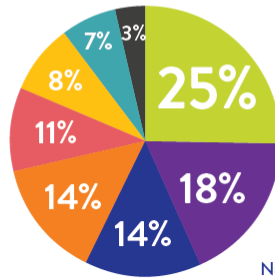
THEATRE



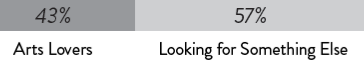
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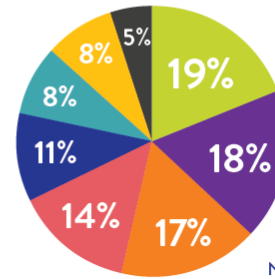
ORCHESTRA, SYMPHONY, OR CHAMBER MUSIC



N=1140



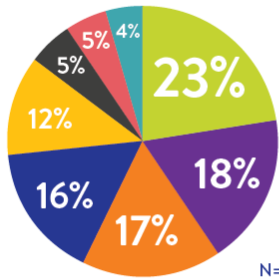
OPERA



N=367



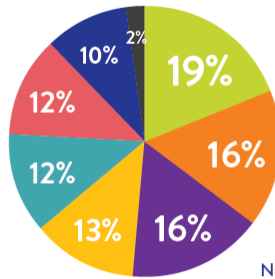
CLASSICAL MUSIC FESTIVAL



N=227



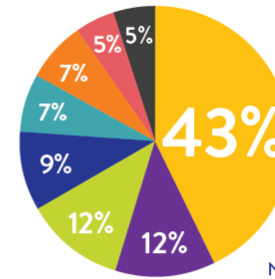
DANCE



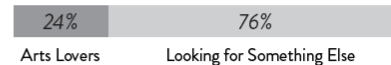
N=183



CHORUS



N=42

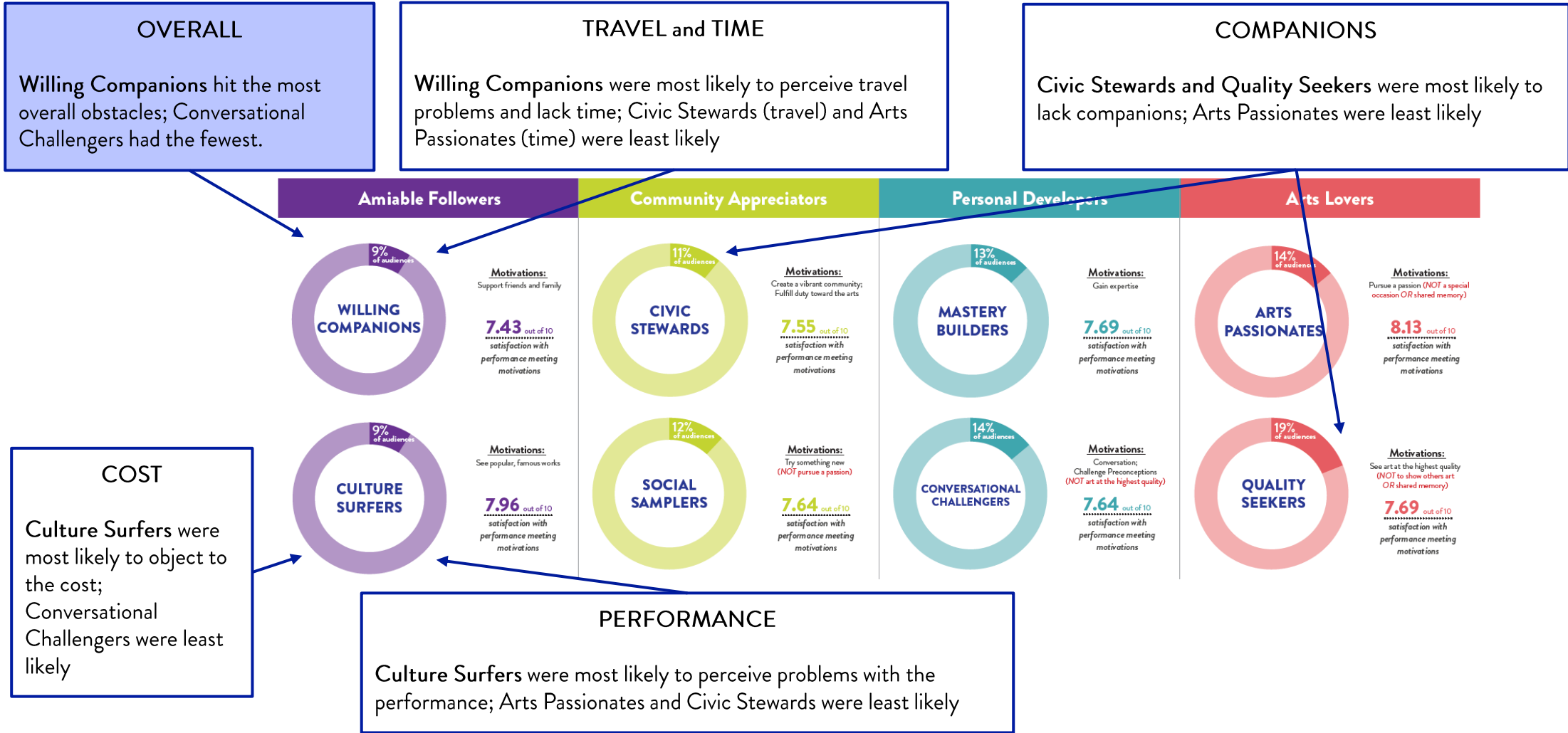


In the overall distribution – combining all genres (N=4600) – 33% of audiences are 'Arts Lovers' and 66% are 'Looking for Something Else' from the performance.

The Arts Lovers are roughly a third of audiences no matter the genre

- Theater has more Conversational Challengers, fewer Arts Passionates
- Orchestra and Classical Festivals have more Arts Lovers overall, but still only 41% in total
- Dance has more Willing Companions and fewer Culture Surfers.

Motivational Segment Impacts Perception of Obstacles



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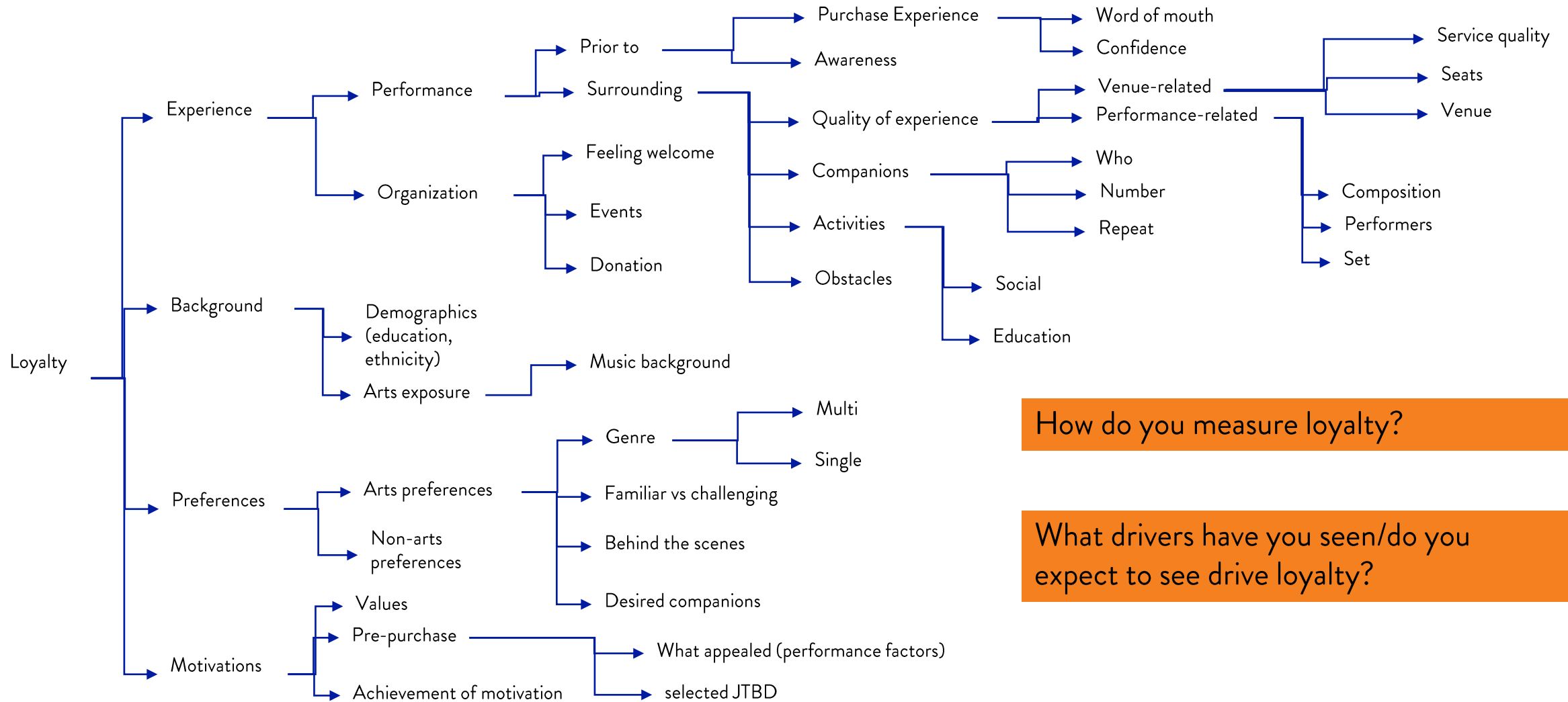
04

Other
Findings

05

Next
Steps

Loyalty Model



How do you measure loyalty?

What drivers have you seen/do you expect to see drive loyalty?

Different Metrics, Different Results

Loyalty Dependent Variables

Forward-Facing

("What will you do in the future?")

- Recommendation
- Likely repurchase from venue

Backward-Facing

("What have you done in the past?")

- Number of performances attended
- Arts subscriber
- Donor/Donation amount

Regression Analysis

Recommendation	25%	75%	Impact	Estimate	Std. Error	t value	Pr(> t)	Sig	Impact
Intercept				-4.15528	0.7148	-5.813	7.20E-09	***	-
Mot_Supportive_Friend	-0.39833	-0.2223	0.00	0.00739	0.0337	0.219	0.826334		
Mot_Learn_Something	-0.39929	-0.1761	0.01	0.04459	0.0315	1.416	0.156821		
Mot_Popular_Famous	-0.41822	-0.2058	0.01	0.02439	0.0355	0.688	0.491712		
Mot_Challenge_Converse	-0.65297	0.1624	(0.05)	-0.0613	0.0397	-1.543	0.12289		
Mot_Best_Art_For_Me	-0.61408	0.81	(0.11)	-0.07387	0.036	-2.05	0.040502 *		(0.11)
Mot_Arts_Passionate	-0.67205	0.9774	0.08	0.04946	0.0352	1.404	0.160628		
Mot_Try_New	-0.70247	0.3555	(0.09)	-0.08315	0.0333	-2.496	0.012664 *		(0.09)
Mot_Duty	-0.65791	0.5609	(0.05)	-0.03963	0.0321	-1.235	0.216915		
merged_age	59	70	(0.01)	-0.00055	0.0025	-0.217	0.828117		
merged_gender	0	1	0.04	0.04252	0.0802	0.53	0.596027		
merged_education	12	18	0.09	0.01495	0.0138	1.085	0.277848		
num_aware	1	3	0.20	0.09785	0.0279	3.512	0.000455 ***		0.20
preference_pushboundaries	2	3	0.06	0.05703	0.0393	1.452	0.146609		
preference_behindthescenes	4	5	0.09	0.08592	0.0361	2.38	0.017396 *		0.09
preference_familiarity	6	9	0.01	0.00235	0.0387	0.061	0.951526		
artsexposure_new_recode	3	3	-	0.12365	0.1036	1.194	0.232619		
artsexposure_attendedaschild	1	3	0.15	0.07659	0.0479	1.601	0.109654		
artsexposure_knowledgeable	2	3	0.00	0.002	0.0652	0.031	0.975514		
artsexposure_performed_toolless	1	3	0.07	0.03732	0.0465	0.802	0.422694		
music_legibility	2	8	(0.08)	-0.01258	0.0115	-1.09	0.275765		
number_companions	2	3	0.05	0.05185	0.0486	1.067	0.286268		
feel_welcome	4	5	0.19	0.19393	0.0382	5.072	4.34E-07 ***		0.19
obstacles_sum	6	9	(0.06)	-0.02105	0.0117	-1.797	0.072534 .		(0.06)
motivation_realityvexpectation	6	10	0.67	0.16731	0.0172	9.71	< 2e-16 ***		0.67
q2_correct_genreclassical music fes	0	1	0.72	0.71552	0.3114	2.298	0.02167 *		0.72
q2_correct_genredance	0	1	0.56	0.55562	0.3413	1.628	0.103737		
q2_correct_genreopera	0	1	0.47	0.47365	0.3126	1.515	0.1299		
q2_correct_genreorchestra, symph	0	1	0.55	0.54809	0.3016	1.817	0.069342 .		0.55
q2_correct_genretheater	0	1	0.53	0.53444	0.3028	1.765	0.077741 .		0.53
perfelement_performerquality	5	5	-	0.49586	0.083	5.974	2.77E-09 ***		-
perfelement_composition	5	5	-	0.74083	0.0623	11.896	< 2e-16 ***		-
perfelement_staging	4	5	0.18	0.17831	0.0535	3.331	0.000882 ***		0.18
perfelement_seats	4	5	0.08	0.07548	0.05	1.509	0.131392		
perfelement_venue	4	5	(0.06)	-0.05705	0.0438	-1.303	0.192601		
perfelement_moneyvalue	4	5	0.43	0.42659	0.055	7.752	1.49E-14 ***		0.43
perfelement_staffservice	4	5	0.02	0.02235	0.0476	0.47	0.638618		

Regression Results

Forward-Facing: regression analysis points to *performance experience* elements of loyalty

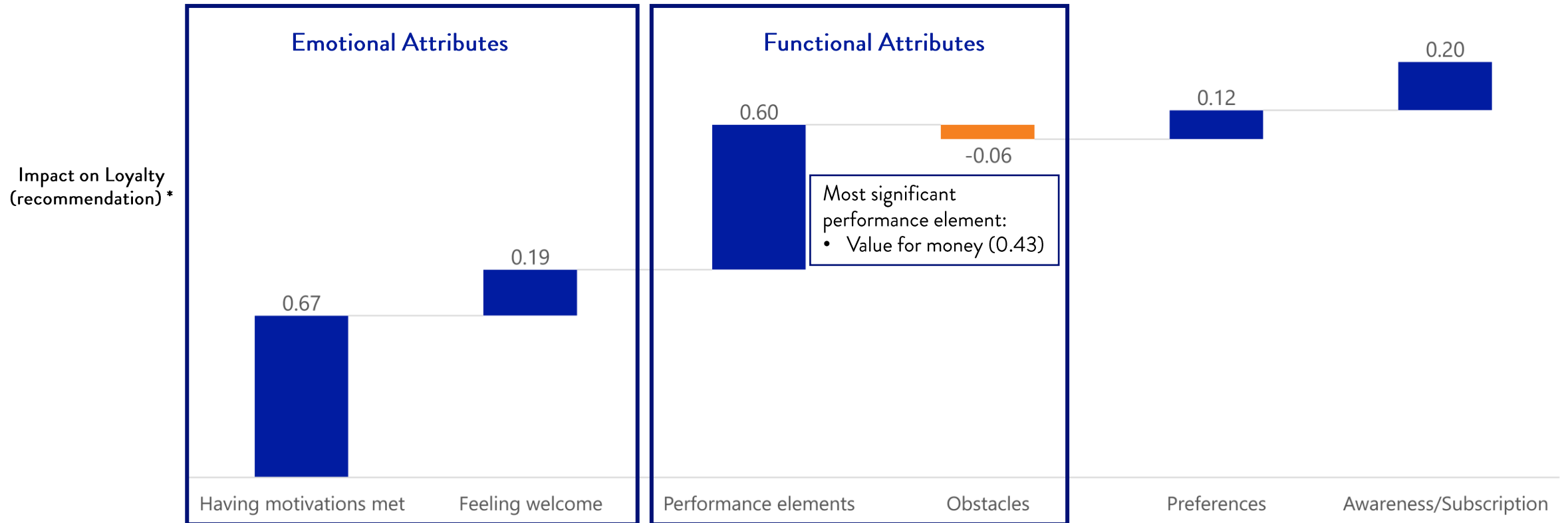
e.g., motivations being met, feeling welcome, obstacles

Backward-Facing: regression analysis points to *inherent* factors of loyalty

e.g., age, awareness methods, preferences, individual motivations

Arts Audiences Reward Emotional Connection with Loyalty

Relative Impact on Recommendation**

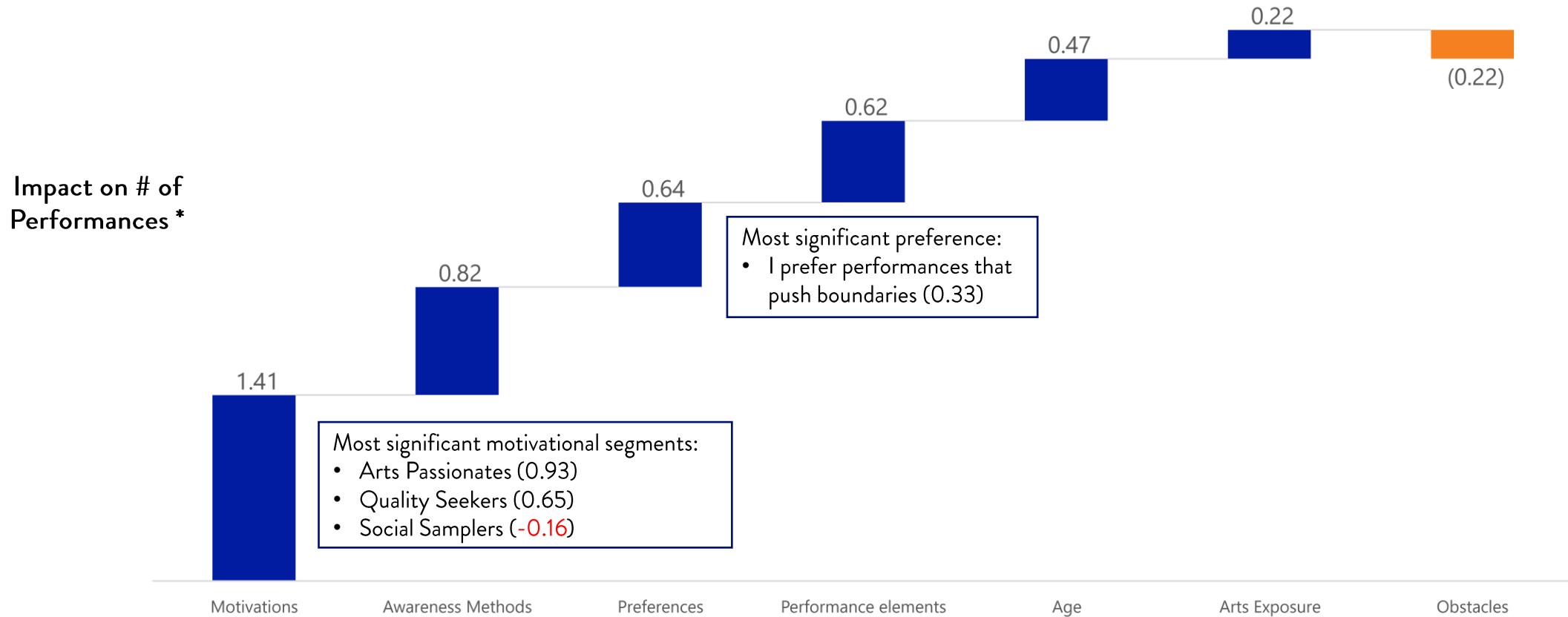


* Measured as impact of moving from 25th to 75th percentile performance on each driver. N = ~5,000

**Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to recommendation but similarly high for all and uncontrollable, so we did not include it above. The Quality Seeker and Social Sampler segments were weakly negative for loyalty

Loyalty Analysis – Number of Performances

Relative Impact on Number of Performances**

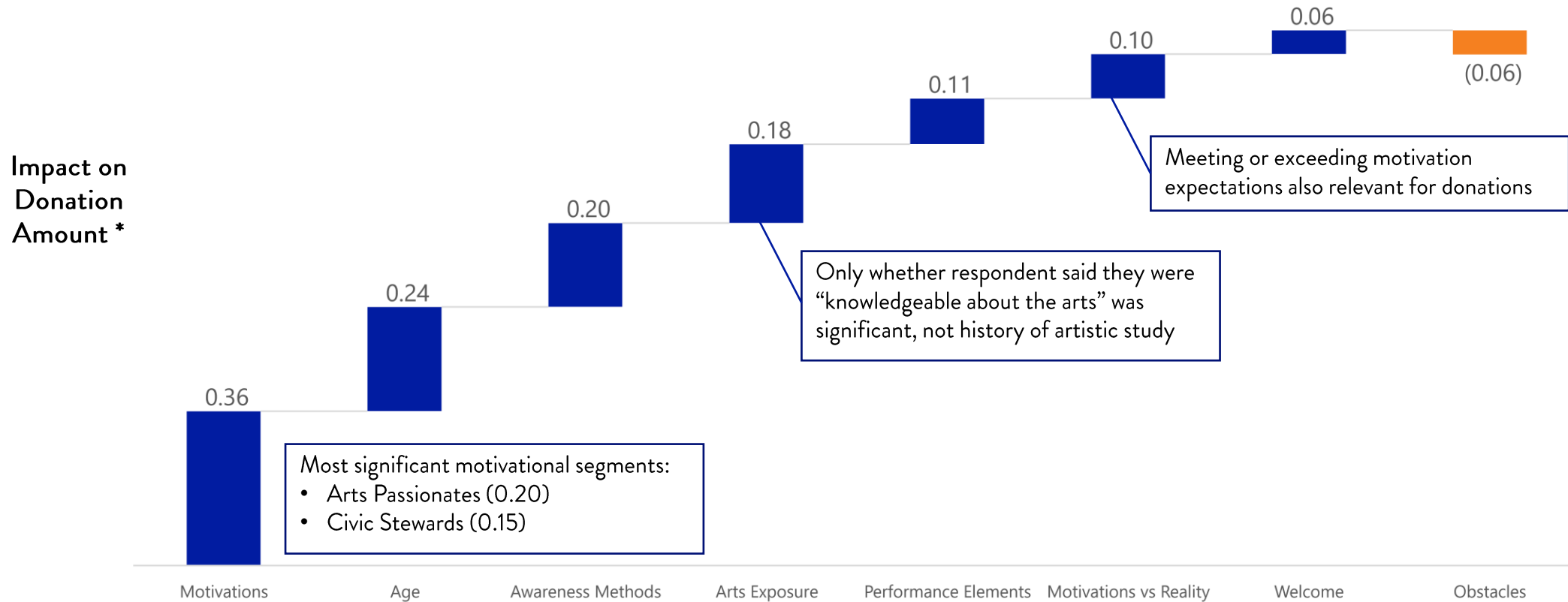


* Measured as impact of moving from 25th to 75th percentile performance on each driver. N = ~5,000

**Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to recommendation – theater, classical music festival and orchestra had more performances attended.

Loyalty Analysis – Donation Amount

Relative Impact on Amount of Donation



* Measured as impact of moving from 25th to 75th percentile performance on each driver. N = ~5,000

**Performance elements = rating of things like performers, composition, staging, seats, staff service, value for money. Preferences refers to interest in challenging or familiar art, or desire to know behind-the-scenes details. Genre was also relevant to donation – theater, classical music festival and orchestra had more performances attended.

Lessons from Regression Analysis

1. Motivations matter, no matter the loyalty measure
2. Obstacles such as parking, venue inconvenience influence loyalty, but not as much as other elements
3. Audience-inherent elements such as age or motivational segment are strong drivers of donation amount or frequency of attendance
4. Meeting or exceeding expectations relative to motivations is the strongest driver for forward-looking loyalty
5. In the arts, as in brands, emotional factors are stronger than functional factors of loyalty

Agenda for our Time

01

Background of
the Initiative

02

Motivations
and Segments

03

Loyalty
Regressions
and Shared
Values

04

Other
Findings

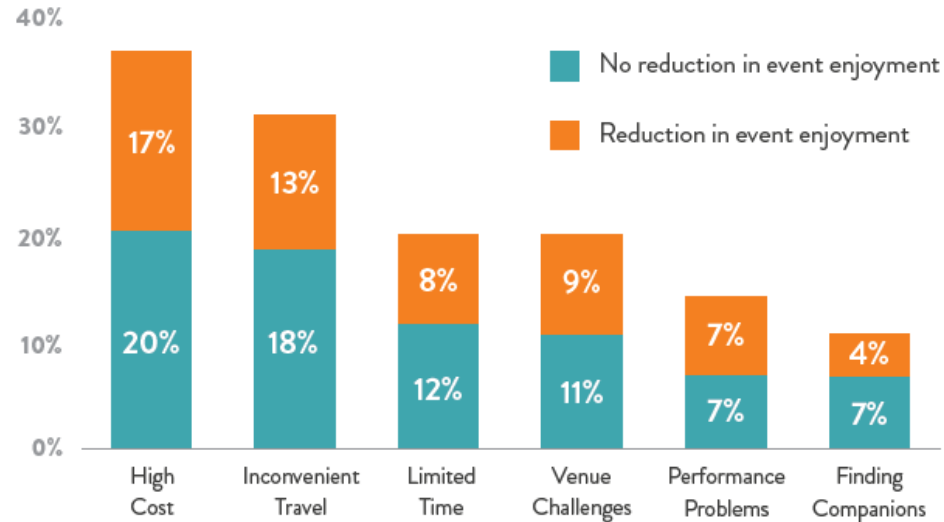
05

Next
Steps

Most Obstacles – While Annoying – Have Little Impact

Presence of Obstacle Does Not Guarantee a Bad Time

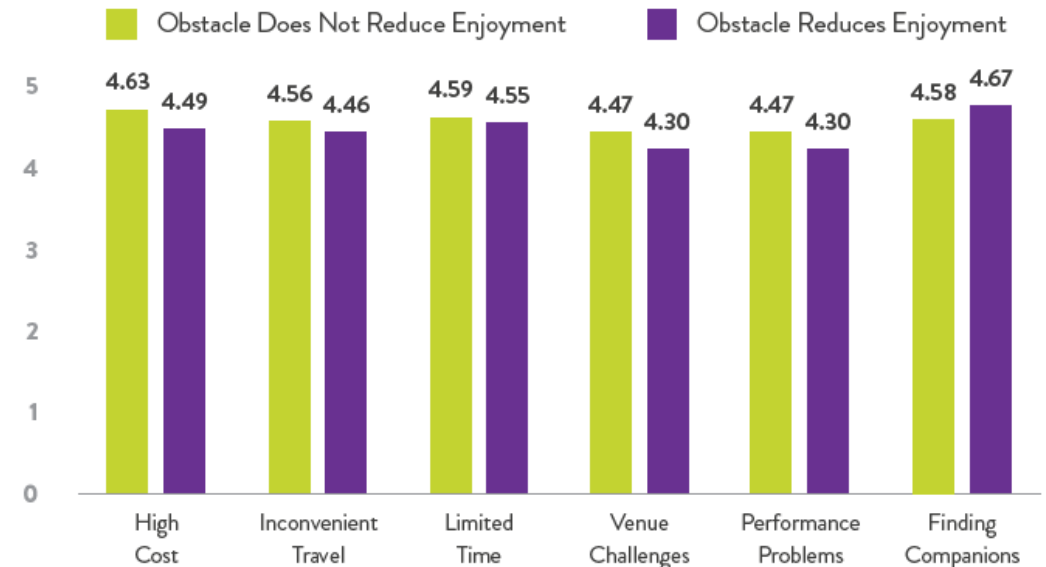
Percent of Arts Patrons Who Experienced an Obstacle From the Performance and its Effect on Their Enjoyment



N=4600

Obstacles Have Little Influence on Repurchase Intent

Average Likelihood to Repurchase at the Same Venue* v. Obstacle Existence



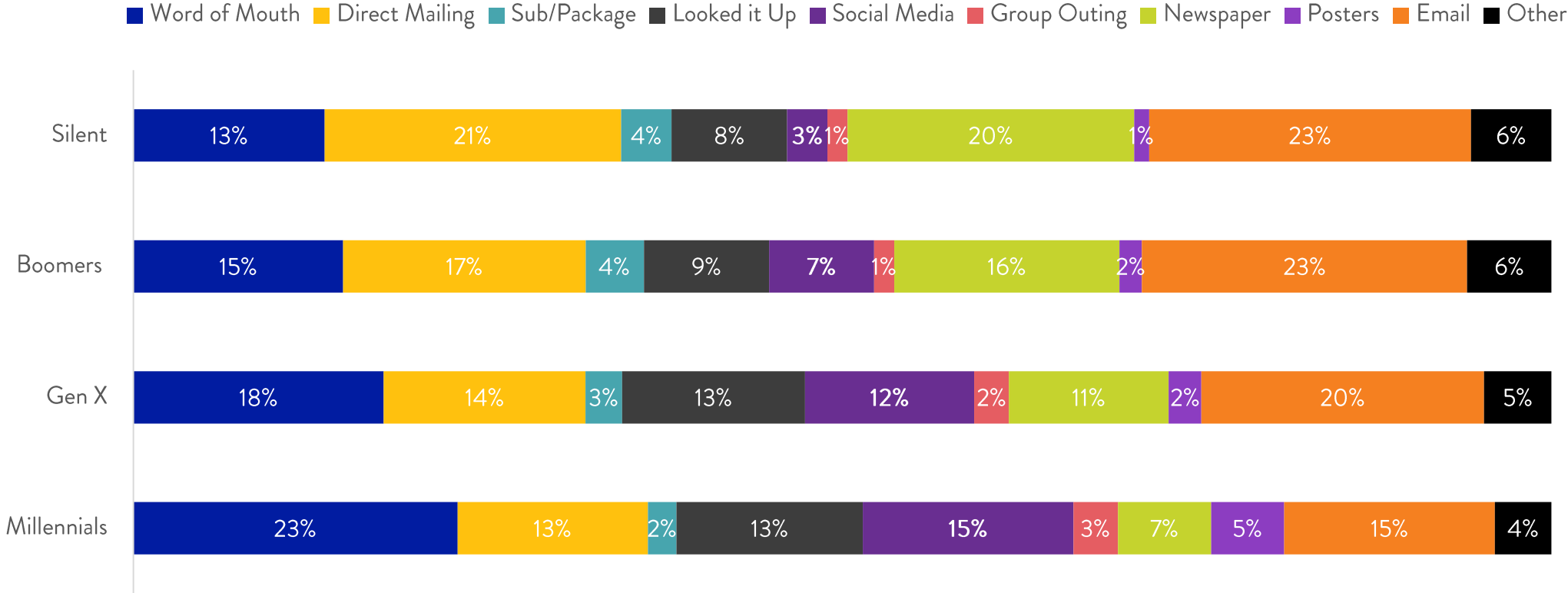
*Scale 1-5: Extremely Unlikely to Repurchase to Extremely Likely to Repurchase

N=4600

We Can't Yet Abandon Direct Mail

Non-Subscriber Methods of Awareness By Generation

(N=1515)



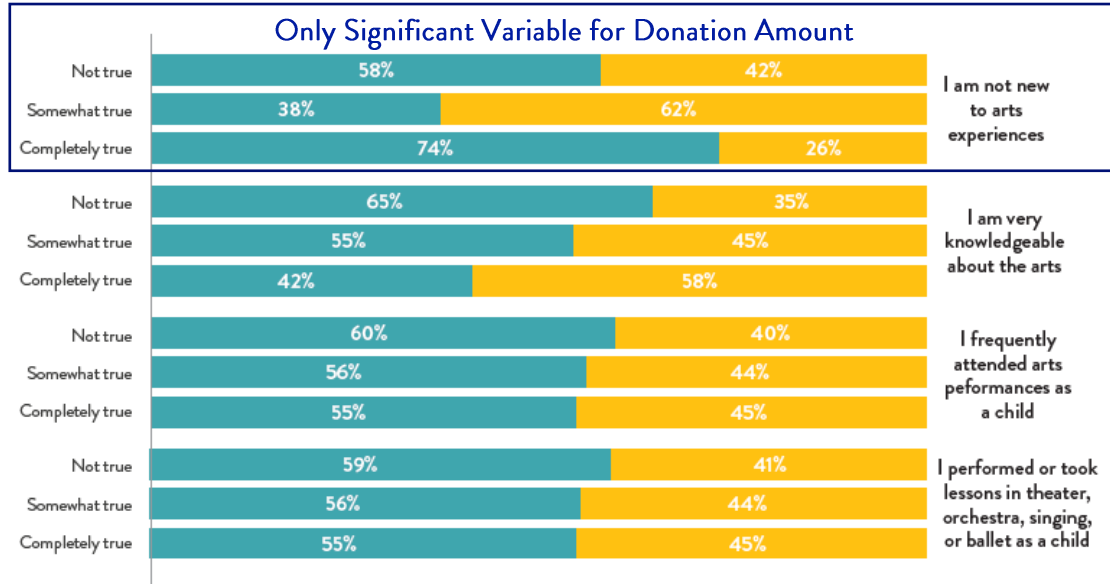
Silent n = 149; Boomers n = 780; Gen X n = 396; Millennials n = 190

Arts Experience Relevant, But Less Than Expected

More Propensity to Donate if Familiar and Knowledgeable About the Arts

Determinants of Arts Exposure v. Donor to an Arts Organization in the Past Year

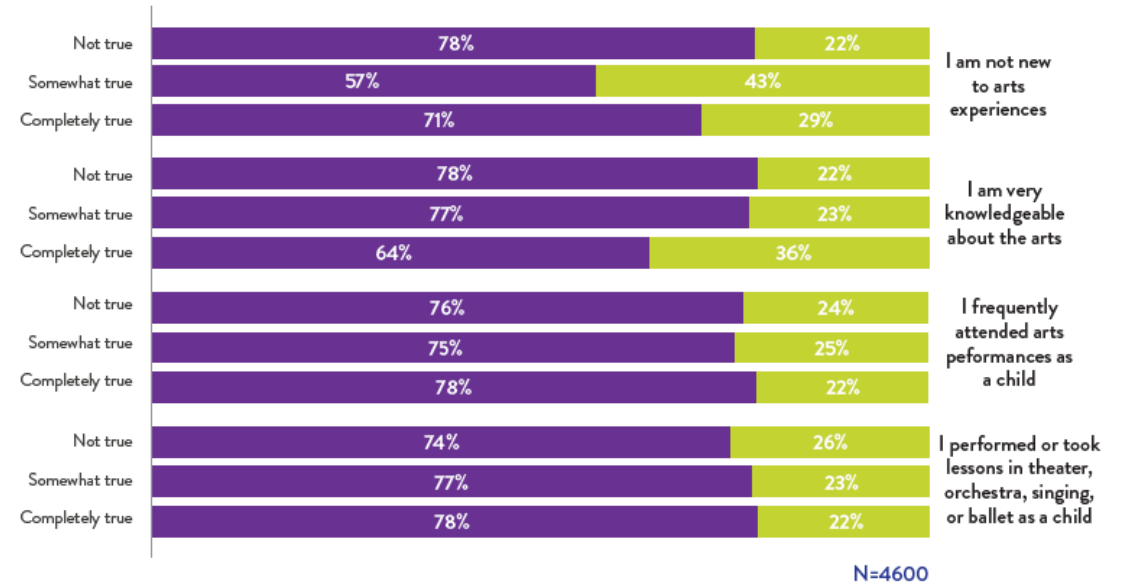
■ Donated to Arts Org in Past Year ■ Did not Donate to Arts Org in Past Year



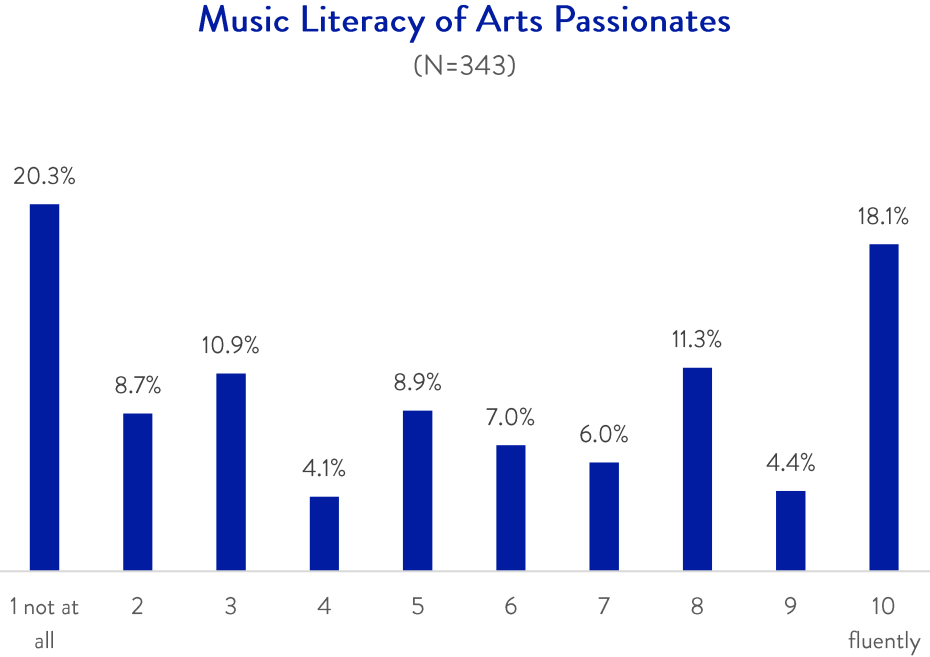
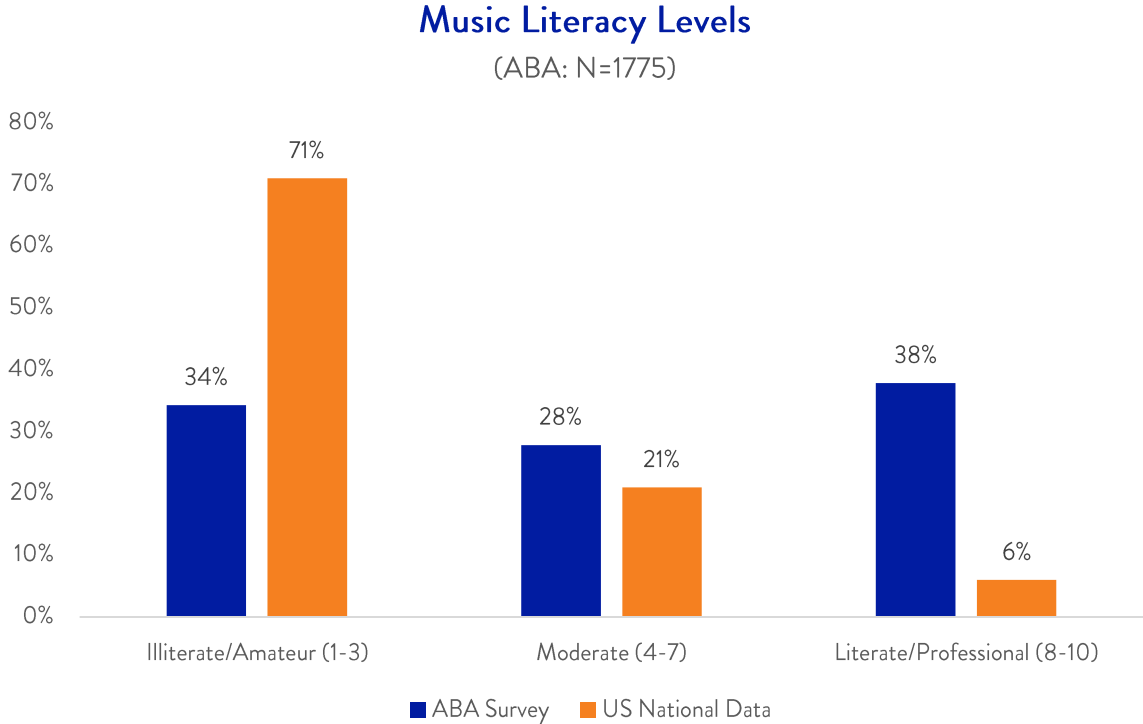
Higher Likelihood to be a Subscriber if Familiar and Knowledgeable About the Arts

Determinants of Arts Exposure v. Subscriber to an Arts Organization in the Past 10 Years

■ Subscriber in the Past 10 Years ■ Not been a Subscriber in the Past 10 Years



Music Literacy Well Above US Population, But Varies

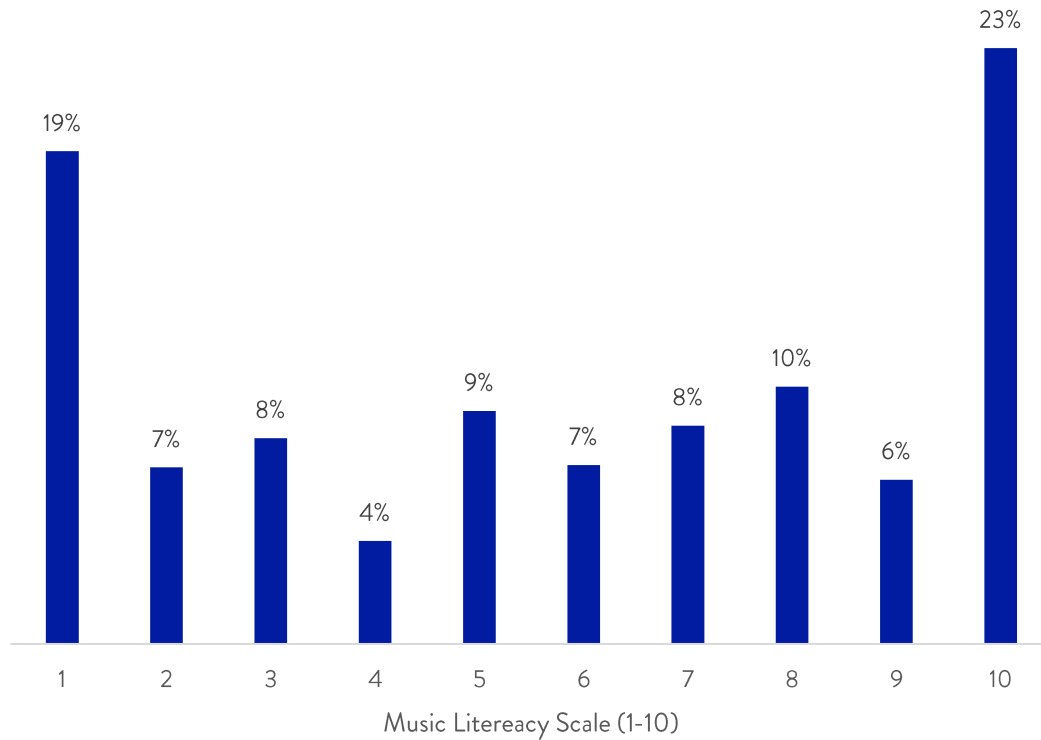


*Both analyses exclude theater. Source for US national data: <https://www.intellectualtakeout.org/article/tragic-decline-music-literacy-and-quality/>

Donor Music Literacy Has No Impact on Donation Amount

Music Literacy of Donors

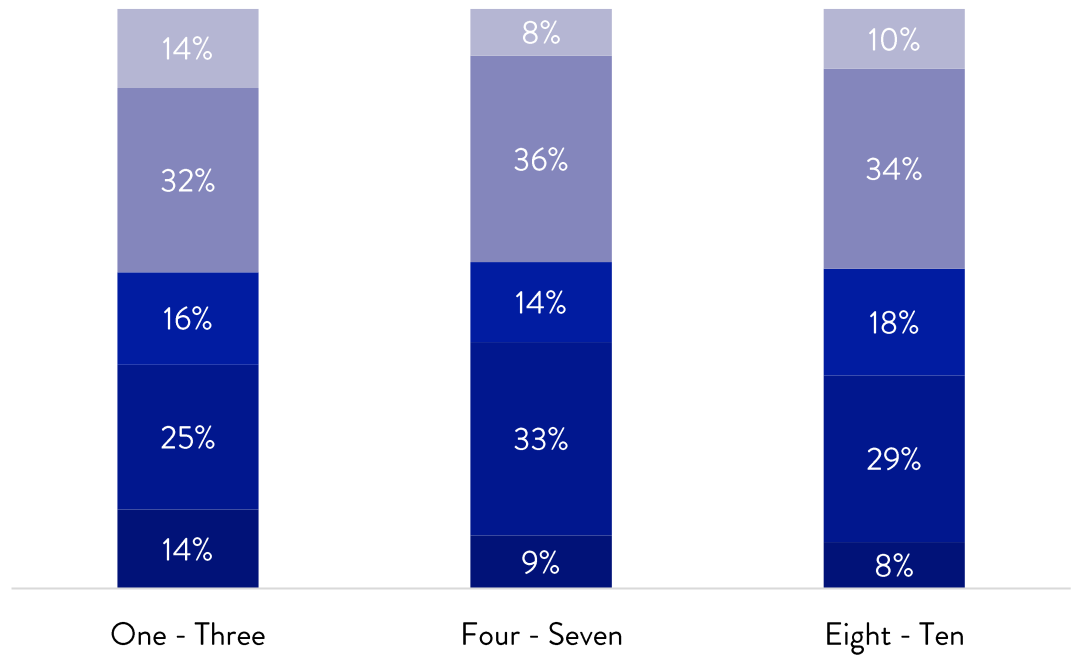
(Those Who Donated to the Arts in the Past Year, N=1071)



Donation Amount By Music Literacy

(N=1701)*

■ \$10,001+ ■ \$1001 - \$10,000 ■ \$501 - \$1000 ■ \$101 - \$500 ■ <\$100



*Both analyses exclude theater. Donation amount excludes those who chose "prefer not to say"

Agenda for our Time

01

Background of
the Initiative

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Loyalty
Regressions
and Shared
Values

03

Motivations
and Segments

04

Other
Findings

05

Next
Steps

Data All Housed in Our Arts360 Tool

General Info karen.freeman@advisoryboardarts.com

Gender: Male
 Birth Date: 6/9/2006
 Age: 23
 Marital Status: Single
 Political Ideology: Likely Liberal
 Registered to Vote: Y

Gender: Male
 Birth Date: 6/9/2006
 Age: 53
 Marital Status: Married
 Political Ideology: Likely Liberal
 Registered to Vote: Y

Gender: Female
 Birth Date: 6/9/2006
 Age: 54
 Marital Status: Married
 Political Ideology: Likely Liberal
 Registered to Vote: Y

L2 ConsumerMapping Cart (0)

General Characteristics

- Household Finances (1)
 - Estimated Income
 - Household Net Worth (1)

Category	Count	Percentage
A--Less Than \$1	0	00.000%
B--\$1 To \$4999	0	00.000%
C--\$5000 To \$9999	0	00.000%
D--\$10000 To \$24999	0	00.000%
E--\$25000 To \$49999	0	00.000%
F--\$50000 To \$99999	0	00.000%
G--\$100000 To \$249999	0	00.000%
H--\$250000 To \$499999	0	00.000%
I--\$500000 And Higher	19,390	100%
Unknown	0	00.000%
- Presence Of Credit Card
- Presence Of Gold Or Platinum Credit Card
- Presence Of Premium Credit Card
- Presence Of Upscale Retail Credit Card
- Presence Of Bankcard
- Gas Dept Retail Credit Card
- American Express Credit Card
- Credit Rating
- Household Number Lines Of Credit
- Credit Range Of New Credit
- Investments--Estimated Real Properties Owned
- Children In Household
- Adults Within Household
- Interests And Buying Habits Within Household
- Household Contribution Patterns (1)
 - Charitable Contributor
 - Donor Animal Welfare
 - Donor Arts Cultural (1)

Category	Count	Percentage
Unknown	0	00.000%
Yes	19,390	100%
 - Donor By Mail
 - Donor Childrens Causes
 - Donor Environmental
 - Donor Environmental Issues

Map Controls

- Boundaries
- Shapes

Universes

- Universes
- Purchased
- Exports

Data Sources

- L2 US Commercial
 - Area Selections
 - Telephone
 - Individual Characteristics (14)
 - Gender
 - Age
 - Marital Status
 - Occupation Group
 - Occupation Of Person
 - Ethnic Code
 - Ethnic Group
 - Hispanic Country Of Origin (14)

Country	Count	Percentage
Bolivia	48	00.344%
Brazil	100	00.717%
Chile	0	00.000%
Colombia	29	00.208%
Costa Rica	2	00.014%
Cuba	111	00.796%
Dominican Repub...	18	00.129%
Ecuador	8	00.057%
El Salvador	133	00.953%
Guatemala	11	00.079%
Honduras	5	00.036%
Mexico	12,385	88.781%
Nicaragua	0	00.000%
Panama	0	00.000%
Peru	26	00.186%
Puerto Rico	1,073	07.692%
Spain	0	00.000%
Unknown	0	00.000%
Uruguay	0	00.000%
Venezuela	1	00.007%
 - English Language Assimilation

Join Our Mini-Summit in January



ANNOUNCING

COMING BACK

STRONGER

Using the Shutdown to Rebuild Audience Loyalty

MEMBERS-ONLY VIRTUAL SUMMIT

JANUARY 11-15

The graphic features the word 'STRONGER' in large, bold letters. Each letter is filled with a different image: 'S' shows a woman in a red dress; 'T' shows a man in a dark shirt; 'R' shows a theater interior; 'O' shows a blue and purple light effect; 'N' shows a man in a dark shirt; 'G' shows a group of people; 'E' shows a theater interior; 'R' shows a woman in a purple dress. The background is a light gray with a geometric pattern of overlapping triangles.

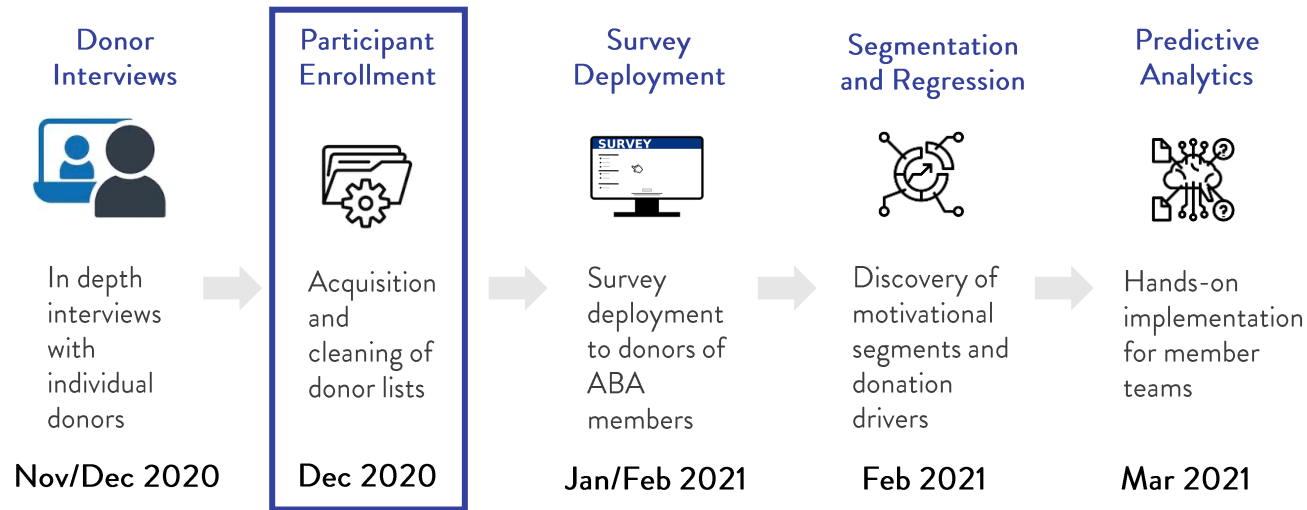
We'll Be Back With More in 2021

Choosing high-potential Segments	Designing relevant and resonant experiences	Building the test & learn experimentation engine	Aligning the organization to execute on experiences	Marketing for the job to be done
<p>Understanding Motivational Segments</p> <p>A data-driven look at motivation-driven audience segments</p> <ul style="list-style-type: none"> • Segment size analysis • Regional opportunity map <p>Clarifying core brand and mission</p> <p># Identifying shared values</p> <p># Opportunity/Fit Assessment</p>	<p>Overview of Design Thinking</p> <p>Case example of experience design</p> <p>Building an experience around audience motivation</p> <p># Motivation-based personas</p> <p># Customer immersion sessions</p> <p># Experience Journey Maps/Checklists</p> <p># Designing “minimally viable” experiences</p>	<p># Choosing experiences that can co-exist</p> <p>#Gathering audience feedback about the experience</p> <p># Establishing success metrics</p> <p>Funding Experimentation</p> <p>Grant-writing tool kit</p>	<p>Embedding Empathy in the Organization</p> <p># Persona collateral & champions</p> <p># Executive team motivation quiz</p> <p># Motivation based candidate case study</p> <p>Coordinating across silos</p> <p># Cross-silo audience growth team</p> <p># Organizational alignment tool</p>	<p>Targeting segments</p> <p>Building purchase confidence</p> <p>Capturing moments of truth</p> <p>Showcase: experiential messages</p> <p>Showcase: targeted programs/discount programs lessons learned</p>

Donor Research Initiative: Confirm Interest by Dec 31

Overview of the Quantitative Phase

The donor research initiative has already begun. We are currently interviewing dozens of large donors at arts organizations around the world. In early 2021 we will launch a survey to hundreds of thousands of donors globally. Any member may take part at no cost, and those who do will receive customized analysis of the motivations of their own donor base. Contact your Member Advisor or diana.wang@advisoryboardarts.com to participate.



What We Will Ask Donors

The donor survey is intended to give ABA members an unparalleled understanding of giving from the perspective of donors themselves. The survey will explore the motivations of givers, as the drivers of shifts in giving—both giving more and giving less to organizations they care about.

Motivations for Giving

- Community
- Duty to the arts
- Personal passion
- Status/peer pressure
- Challenge preconceptions

Personal Values

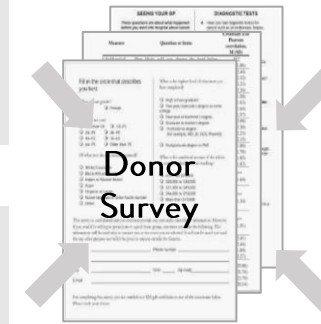
- Fairness
- Compassion
- Respect
- Making a difference
- Balance

Loyalty Factors

- Frequency of donation
- Amount of donation
- Donor recruitment
- Attitudinal loyalty

Contextual Factors

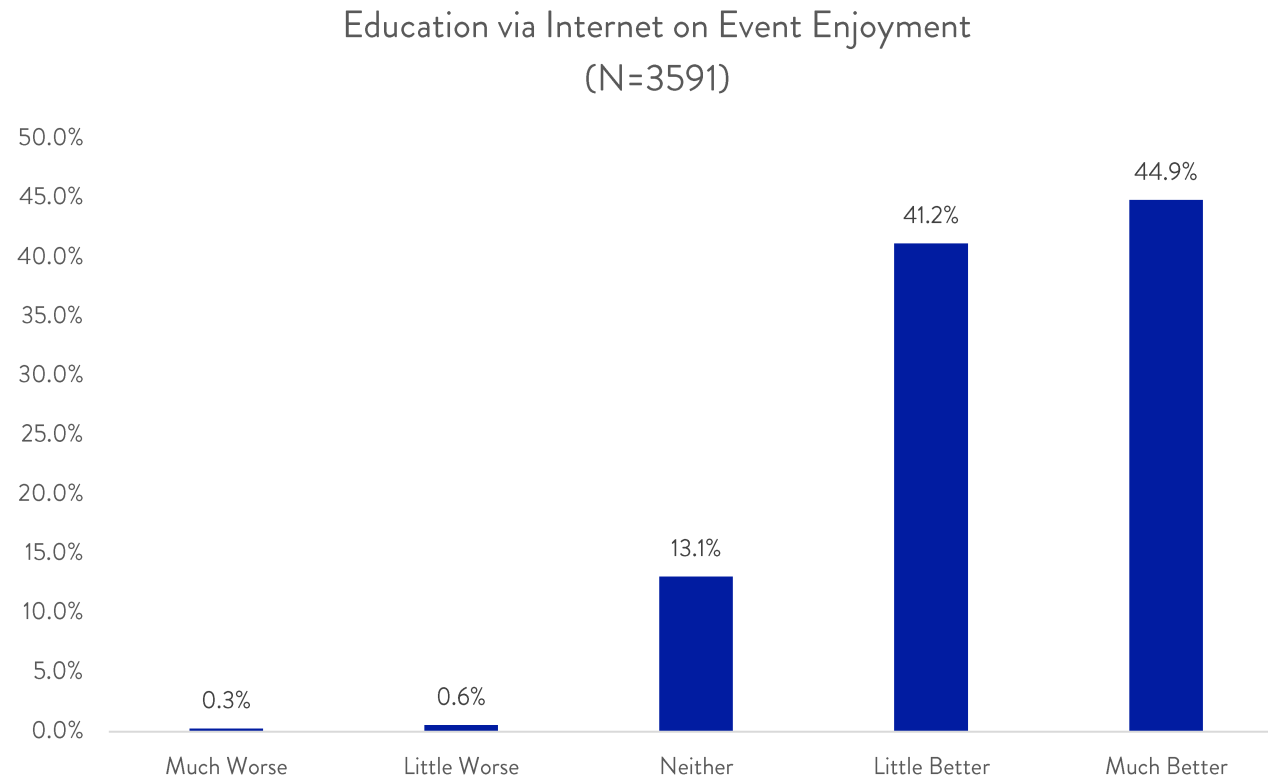
- Attendance patterns
- Contributions to other non-profits
- Type of giving (e.g., campaign related)



Values

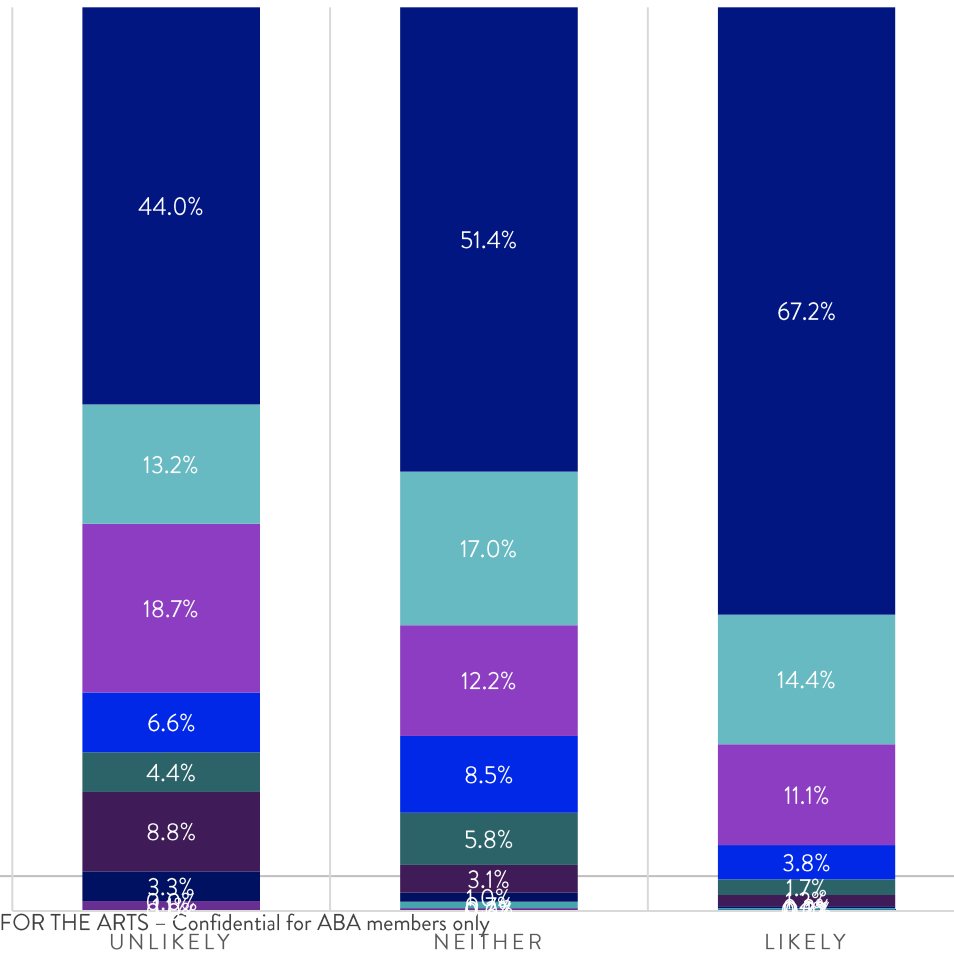
1. Accountability
2. Achievement
3. Adaptability
4. Ambition
5. Balance (home/work)
6. Being liked
7. Being the best
8. Caring
9. Caution
10. Clarity
11. Coaching/mentoring
12. Commitment
13. Community involvement
14. Compassion
15. Competence
16. Conflict resolution
17. Continuous learning
18. Control
19. Courage
20. Creativity
21. Dialogue
22. Ease with uncertainty
23. Efficiency
24. Enthusiasm/positive attitude
25. Entrepreneurial
26. Environmental awareness
27. Ethics
28. Excellence
29. Fairness
30. Family
31. Financial stability
32. Forgiveness
33. Friendship
34. Future generations
35. Generosity
36. Health
37. Humility
38. Humor/fun
39. Independence
40. Initiative
41. Integrity
42. Job security
43. Leadership
44. Listening
45. Making a difference
46. Openness
47. Patience
48. Perseverance
49. Personal fulfillment
50. Personal growth
51. Personal image
52. Power
53. Professional growth
54. Recognition
55. Reliability
56. Respect
57. Reward
58. Risk-taking
59. Safety
60. Self-discipline
61. Teamwork
62. Trust
63. Vision
64. Wealth
65. Well-being
(physical/emotional/mental/spiritual)
66. Wisdom

Q28.1: Educating myself about the performance through reading/the internet



PURCHASE CONFIDENCE V. REPURCHASE (PERFORMERS)

■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10



PURCHASE CONFIDENCE V. REPURCHASE (COMPOSER, ETC.)

■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10

